



Medicaid Management Information Systems
Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses

Date of Publication: 11/14/2014
Document Number: UM00075
Version: 3.0

Revision History

Version	Date	Author	Action/Summary of Changes	Status
1.1	5/9/2011	Sean Higgins	Updated existing document to match language and screenshots in other TP Guides, added w-9 note to demographic screen instructions, added User Maintenance chapter from other guides.	Draft
1.2	6/1/2011	Sean Higgins	Made suggested revisions	Draft
1.2	6/16/2011	Sean Higgins	Updated Trading Partner power grid to display only context-sensitive information for each trading partner type	Draft
1.3	7/26/2011	Sean Higgins	Final formatting, copyediting, replaced screenshots that showed Trading Partner permissions unavailable to clearinghouses	Draft
2.0	7/28/2011	Sean Higgins	Finalized based on formal acceptance received from the State on 7/28/2011	Final
2.1	10/29/2014	Ryan Albrecht	Updated per CR33834 CAQH CORE III and to current documentation standards	Draft
3.0	11/14/2014	Ryan Albrecht	Finalized based on formal acceptance received from the State on 11/14/2014	Final

Usage Information

Documents published herein are furnished “As Is.” There are no expressed or implied warranties. The content of this document herein is subject to change without notice.

HIPAA Notice

This Maine Health PAS Online Portal is for the use of authorized users only. Users of the Maine Health PAS Online portal may have access to protected and personally identifiable health data. As such, the Maine Health PAS Online Portal and its data are subject to the Privacy and security Regulations within the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 (HIPAA).

By accessing the Maine Health PAS Online Portal, all users agree to protect the privacy and security of the data contained within as required by law. Access to information on this site is only allowed for necessary business reasons, and is restricted to those persons with a valid user name and password.

Table of Contents

1.	Introduction	1
2.	Information Needed	1
3.	System Requirements.....	1
4.	Complete the Registration Steps	2
4.1	Choose the Trading Partner Registration Link.....	2
4.2	Provide Demographics Information	2
4.3	Specify Security Information	4
4.4	Confirm Information	5
4.5	Sign the Agreement Electronically.....	6
4.6	Activate Account.....	6
5.	Trading Partner Login	7
6.	Trading Partner Logoff	8
7.	Account Maintenance.....	8
7.1	Password Reset Overview	8
7.2	Resetting When the Current Password is Known.....	9
7.3	Resetting When the Current Password is Not Known.....	10
7.4	User Name Retrieval	13
8.	User Maintenance.....	15
8.1	Manage Users.....	15
8.1.1	Adding Users.....	15
8.1.2	Trading Partner Permission Codes	17
8.1.3	(Invited Users Only) Activating a Trading Partner Representative Account	19
8.1.4	Modifying User Permissions	19

List of Figures

Figure 4-1: Trading Partner Registration	2
Figure 4-2: Register As	2
Figure 4-3: Demographics Information	3
Figure 4-4: Security Information	4
Figure 4-5: Confirm Information	5
Figure 4-6: Electronic Signature	6
Figure 4-7: Registration	7
Figure 5-1: User Name and Password.....	7

**Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses**

Figure 5-2: Welcome to Trading Partner	8
Figure 6-1: Trading Partner ID and User Name	8
Figure 7-1: Welcome to Trading Partner	9
Figure 7-2: Reset Password	9
Figure 7-3: Confirmation Message	10
Figure 7-4: Reset Password Link	10
Figure 7-5: Trading Partner Reset Password	11
Figure 7-6: Email Address and Security Q&A	11
Figure 7-7: Confirmation of Password.....	11
Figure 7-8: Change Password	12
Figure 7-9: Password Reset	12
Figure 7-10: Retrieve User Name Link.....	13
Figure 7-11: Email Specification for User Name Retrieval.....	13
Figure 7-12: Multiple Accounts Error	14
Figure 7-13: Email Address and Security Q&A	14
Figure 7-14: Confirmation Message for User Name Retrieval	14
Figure 8-1: Account Maintenance.....	15
Figure 8-2: Add User	15
Figure 8-3: Permission Fields	16
Figure 8-4: Invited Users	16
Figure 8-5: Trading Partner Registration	19
Figure 8-6: Manage Users.....	20
Figure 8-7: Manage Users with Additional Permissions	20
Figure 8-8: User List with Modified Permissions.....	21

List of Tables

Table 1: Trading Partner Permission Codes & Descriptions	17
Table 2: Clearinghouse User Powers Grid.....	18

1. Introduction

This *Trading Partner Guide for Clearinghouses* describes several processes that will be useful to clearinghouses that want to register as trading partners. The following sections contain a list of the information needed before starting the registration process, as well as a detailed description of how to complete each of the registration steps.

If the user is not a clearinghouse that wants to register as a trading partner, refer to the appropriate document in the Trading Partner Guides repository on the MIHMS Health PAS Online Portal (online portal).

2. Information Needed

Before registering as a trading partner, make sure that the following information is readily available:

- Tax ID of the Clearinghouse.
- Name, business address, business telephone number, and email address for the person who is completing the trading partner registration. (This information is used to create the main trading partner account for the clearinghouse.)
- (Optional) The names and email addresses of additional people to affiliate to the main trading partner account as representatives of the clearinghouse. Representatives may be additional parties who work for the clearinghouse that may have an interest in such activities as maintaining the clearinghouse's account as business needs change.

***NOTE:** This information is used to create the trading partner account for the clearinghouse.*

3. System Requirements

To successfully use all features of the online portal, ensure that computer systems meet the following minimum requirements:

- Reliable online connection
- Web browser – The latest version of Microsoft Internet Explorer is recommended. As new versions of Internet Explorer become available it is recommended that these versions are used.
- The latest version of Adobe Acrobat Reader

4. Complete the Registration Steps

4.1 Choose the Trading Partner Registration Link

Click the **Register** link to access the first Trading Partner registration page. The link is located on the left side of the online portal Provider page, see **Figure 4-1** below:

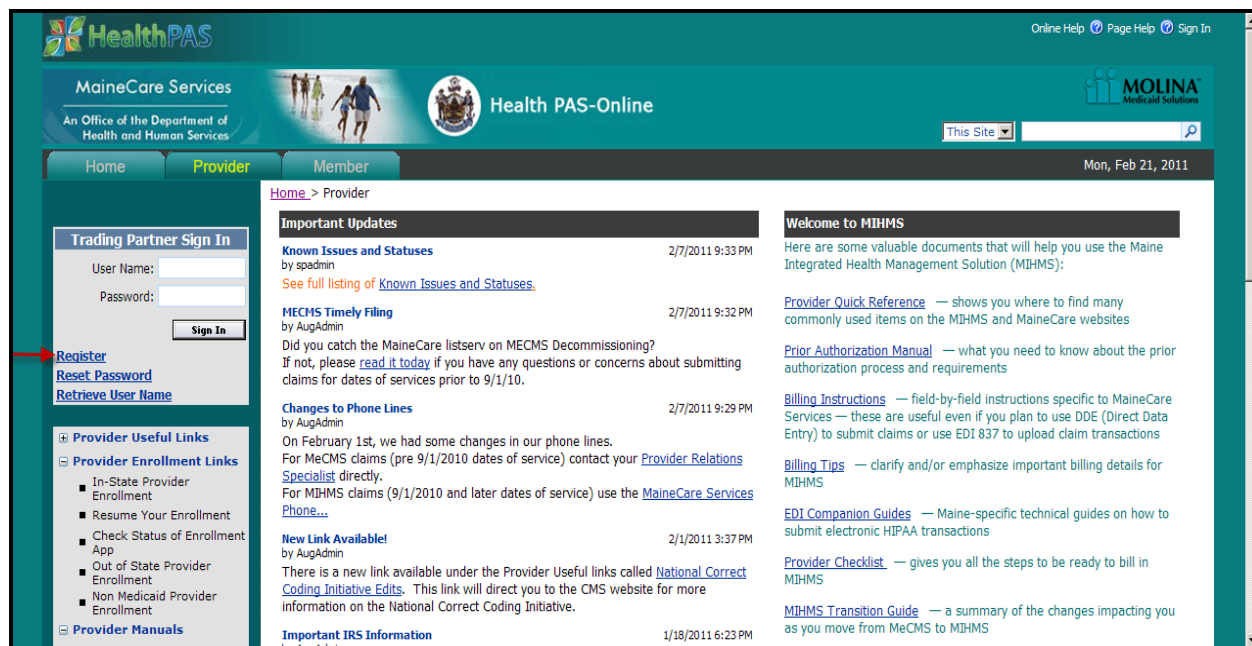


Figure 4-1: Trading Partner Registration

4.2 Provide Demographics Information

The first trading partner window is shown below in **Figure 4-2**. On this window, first select the Clearinghouse type of trading partner from the drop down menu.

The screenshot shows the 'Step 1: Demographic Information' window. It has a form with fields for 'Name:', 'Company Name:', and 'Address 1:'. To the right of the 'Name:' field is a dropdown menu labeled 'Register As:'. The dropdown menu is open, showing a list of options: 'Clearinghouse' (selected), 'Provider', 'Billing Agent', 'Clearinghouse' (highlighted), 'Health Plan', 'Internal', and 'Public'.

Figure 4-2: Register As

To complete the demographics window, follow the steps below, see **Figure 4-3** below:

**Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses**

Step 1: Demographic Information

Register As: Clearinghouse

*First Name M.I. *Last Name Title

*Name: [] [] [] []

*Company Name: []

*Address 1: []

Address 2: []

*City: []

*State: ME

ZIP code must be in xxxxx or xxxxx-xxxx for USA and AXA XAX for Canada. A is any uppercase alphabetic character and X is a numeric digit from 0 to 9.

*ZIP: []

Country: []

*Telephone: []

Website Address: []

*Tax ID: []

Next Cancel

Figure 4-3: Demographics Information

1. In the Name fields, indicate the name of the person completing this registration. First and last names are required, the middle initial and title are optional.
2. In the Company Name field, indicate the company name. This is a required field.
3. In the Address 1 field, indicate the first line of the business address. This is a required field.
4. In the Address 2 field, indicate the second line of the business address. This is an optional field.
5. In the City, State, and ZIP fields, indicate the appropriate information for the business address. These fields are required.
6. In the Country field, indicate the country of the business. This is an optional field.
7. In the Telephone fields, provide the business phone number, including area code. This is a required field.
8. Indicate the website address (URL) for the business. This is an optional field.
9. In the Tax ID field, indicate the clearinghouse's tax ID (FEIN or SSN). This is a required field.
10. Complete one of the following:
 - To continue to the next step in the registration process, click the **Next** button. Proceed to **Section 4.3: Specify Security Information**.
 - To cancel the registration, click the **Cancel** button.

4.3 Specify Security Information

On the second window create a user name, password, and security question and answer. Specify a valid email address.

The Security Information window appears as shown in **Figure 4-4** below:

Step 1: Demographic Information

Step 2: Security Information

* User Name:

Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number.

* Password:

* Re-enter Password:

* Email Address:

* Re-enter Email Address:

Please enter a confidential question and answer for password reset and user name recovery purposes.

* Security Question:

* Security Answer:

Next Back Cancel

Step 3: MaineCare: Electronic Remittance Advice Information

Step 4: Confirm Information

Step 5: Agreement

Figure 4-4: Security Information

To complete the Security window, follow the steps below:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. In the Email Address field, type a valid email address. (A confirmation email is sent to this address, so it is important that the address is valid.)
5. In the Re-Enter Email Address field, retype the email address exactly as typed in the previous field.
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, “What street did I live on as a child?” or “What was the make of my first car?”) If a password is forgotten this question and answer pair is used to verify the user’s identity.

NOTE: All fields are required.

7. Complete one of the following:
 - To continue to the next step in the registration process, click the **Next** button. Proceed to **Section 4.4: Confirm Information**.
 - To return to the previous registration step, click the **Back** button. Refer to **Section 4.3: Specify Security Information**, for instructions.
 - To cancel the registration, click the **Cancel** button.

4.4 Confirm Information

After completing the Security Information window, click the **Next** button, the Confirm Information window appears, as shown in **Figure 4-5** below:

The screenshot shows a software window titled 'Confirm Information'. At the top, there is a vertical list of steps: 'Step 1: Demographic Information', 'Step 2: Security Information', 'Step 3: Confirm Information' (which is highlighted in blue), and 'Step 4: Agreement'. The main area of the window contains the following text:

Name : Clarence House
Address : 1234 Main St
Company Name : Maine Clearinghouse
City : Augusta
State : ME
Zip : 04330
Country : USA
Telephone : 207-555-1212
User Name : SampleClearinghouse
Email Address : clarence.house@domainname.com
Security Question : What is the first street I lived on in my hometown?
Security Answer : Water

At the bottom of the window, there are three buttons: 'Confirm', 'Back', and 'Cancel'. The 'Step 4: Agreement' button at the very bottom right has a dropdown arrow.

Figure 4-5: Confirm Information

Verify that all information displayed on this window is accurate. If anything is incorrect, click the **Back** button to go back to the window where the information was originally entered, correct the field, and click the **Next** button until reaching the Confirm Information window again.

After verifying the accuracy of the information on this window, complete one of the following:

- To continue to the next step in the registration process, click the **Confirm** button. Proceed to **Section 4.5: Sign the Agreement Electronically**.
- To return to the previous registration step, click the **Back** button. Refer to **Section 4.3: Specify Security Information**, for instructions.
- To cancel the registration, click the **Cancel** button.

4.5 Sign the Agreement Electronically

After confirming the information, the Electronic Signature window appears, as shown in **Figure 4-5** below:

The screenshot shows a web application window titled "Step 4: Agreement". At the top, there are four steps: "Step 1: Demographic Information", "Step 2: Security Information", "Step 3: Confirm Information", and "Step 4: Agreement". The "Step 4: Agreement" step is highlighted. Below the steps, there is a box containing the following information:

Trading Partner ID:
Entity Type: CHSE
Tax ID: 123456789

Molina Medicaid Solutions - Maine

CLEARINGHOUSE TRADING PARTNER AGREEMENT

Please read the entire agreement and provide your electronic signature of acceptance on the final page of this document.

☐ Yes, I agree to the above terms and conditions.

Please Enter the First Name and Last Name as in Demographics Information (Clarence House)

*Signature Date
Host Name: IP Address:

A red arrow points to a "Print" button located on the right side of the agreement text.

Figure 4-6: Electronic Signature

On the Electronic Signature window, the Trading Partner Agreement is displayed. Be sure to read the agreement. To agree to the terms and conditions of the Agreement, click the **checkbox** below it that indicates “**Yes, I agree to the above terms and conditions**”.

To sign the Agreement, type the first and last names entered on the Demographics Information window (Step 1/5) in Section **4.2: Provide Demographics Information**, exactly as they appear there. Then, complete one of the following:

- To print the trading partner agreement, click the **Print** link that is located below the right side of the agreement window. This could be useful to facilitate any reviews of the agreement.
- To complete the registration process, click the **Register** button. Proceed to Section **4.6: Activate Account**.
- To go back to the Confirm Information window, click the **Back** button. Refer to Section **4.4: Confirm Information**, for instructions.
- To cancel registration, click the **Cancel** button.

4.6 Activate Account

After signing the Trading Partner Agreement and clicking the **Register** button, the Registration window appears, as shown in **Figure 4-7** below:

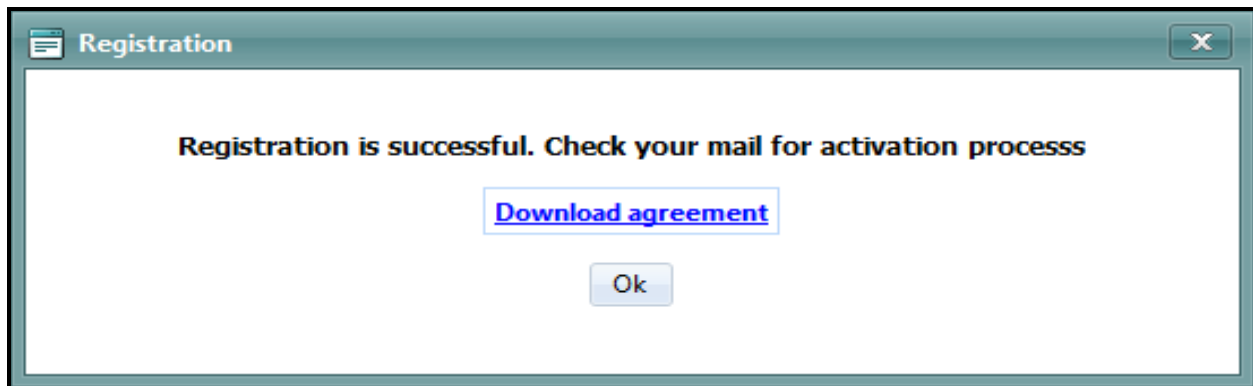


Figure 4-7: Registration

A pdf version of the TPA can be downloaded by selecting the **Download agreement** link. Select the **Ok** button to complete registration. After account activation, a confirmation email with the trading partner ID (TPID) is sent to the address specified during the registration process.

5. Trading Partner Login

Once the account is activated, log in to the secure trading partner features by entering the user name and password in the online portal Provider page fields, see **Figure 5-1** below, and then click the **Sign In** button.

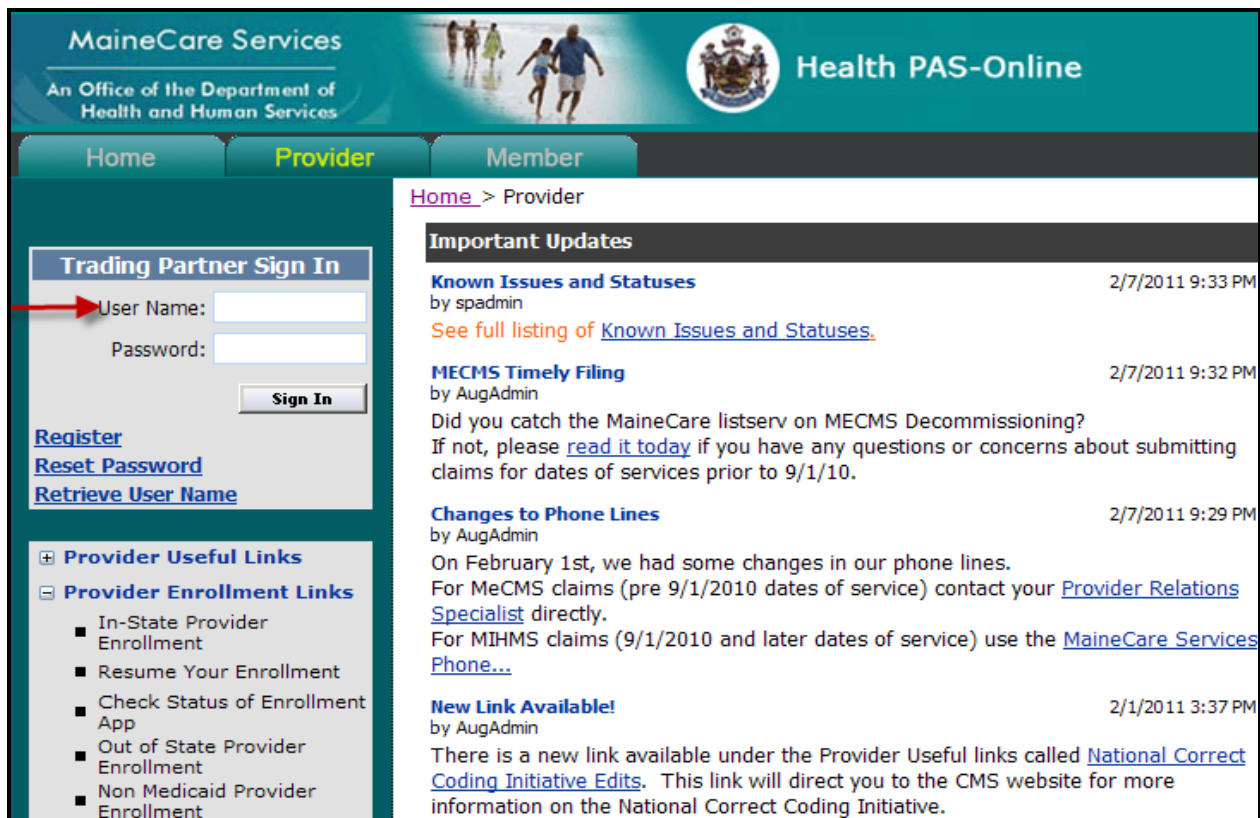


Figure 5-1: User Name and Password

Maine Integrated Health Management Solution Trading Partner Guide for Clearinghouses

The Welcome to Trading Partner window appears, as shown in **Figure 5-2** below:



Figure 5-2: Welcome to Trading Partner

6. Trading Partner Logoff

When logged in as a trading partner, the top status bar changes to indicate both the trading partner ID (TPID) and the user name for the person that is currently logged in. See sample status bar in **Figure 6-1** below:

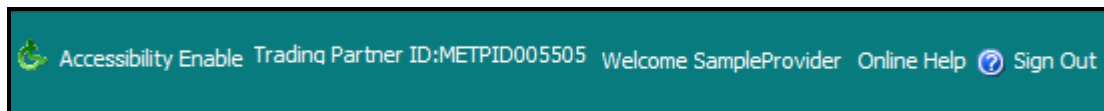


Figure 6-1: Trading Partner ID and User Name

To log off from the online portal, click the **Sign Out** link in the status bar.

7. Account Maintenance

7.1 Password Reset Overview

For additional security, users are required to change the password for the trading partner log in every 60 days. The user name does not change, but the password must be changed. If the password is not changed, after 60 days the user is prompted to reset the password at the next sign in.

If the password for the trading partner user name needs to be reset the following methods are used:

- If the current password is known, it is reset using the Account Maintenance feature. This method is described in Section **7.2: Resetting When the Current Password is Known**.
- If the current password is not known, it is reset from the online portal Provider page. This method is described in Section **7.3: Resetting When the Current Password is Not Known**.

7.2 Resetting When the Current Password is Known

If the current password for the trading partner user name is known, sign in to the online portal. The online portal displays the Welcome to Trading Partner window, as shown in **Figure 7-1** below:



Figure 7-1: Welcome to Trading Partner

1. From the menu at left, select the **Account Maintenance** link to expand the list. From the expanded list, select the **Reset Password** link. The Reset Password window appears, as shown in **Figure 7-2** below:

The screenshot shows a 'Reset Password' form. It has three input fields: '* Current Password:', '* New Password:', and '* Confirm New Password:'. Below the 'Current Password' field, there is a green text message: 'New password should not be same as old password. Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number.' At the bottom of the form, there are two buttons: 'Change Password' and 'Cancel'.

Figure 7-2: Reset Password

2. To reset the password, follow the steps below:
 - a. In the Current Password field, specify current password.

- b. In the New Password field, type a different password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
- c. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
- d. Click the Change Password button. The online portal displays a confirmation message, as shown in **Figure 7-3** below:

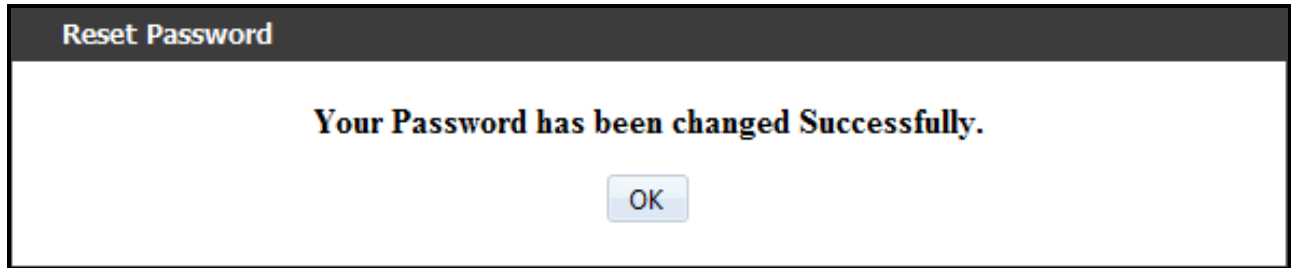


Figure 7-3: Confirmation Message

3. Click **OK** to continue. The online portal returns to the Welcome to Trading Partner window.

7.3 Resetting When the Current Password is Not Known

If the current password is forgotten or lost for the trading partner user name, it is reset from the online portal Provider page. To begin, choose the **Reset Password** link, as shown in **Figure 7-4** below:

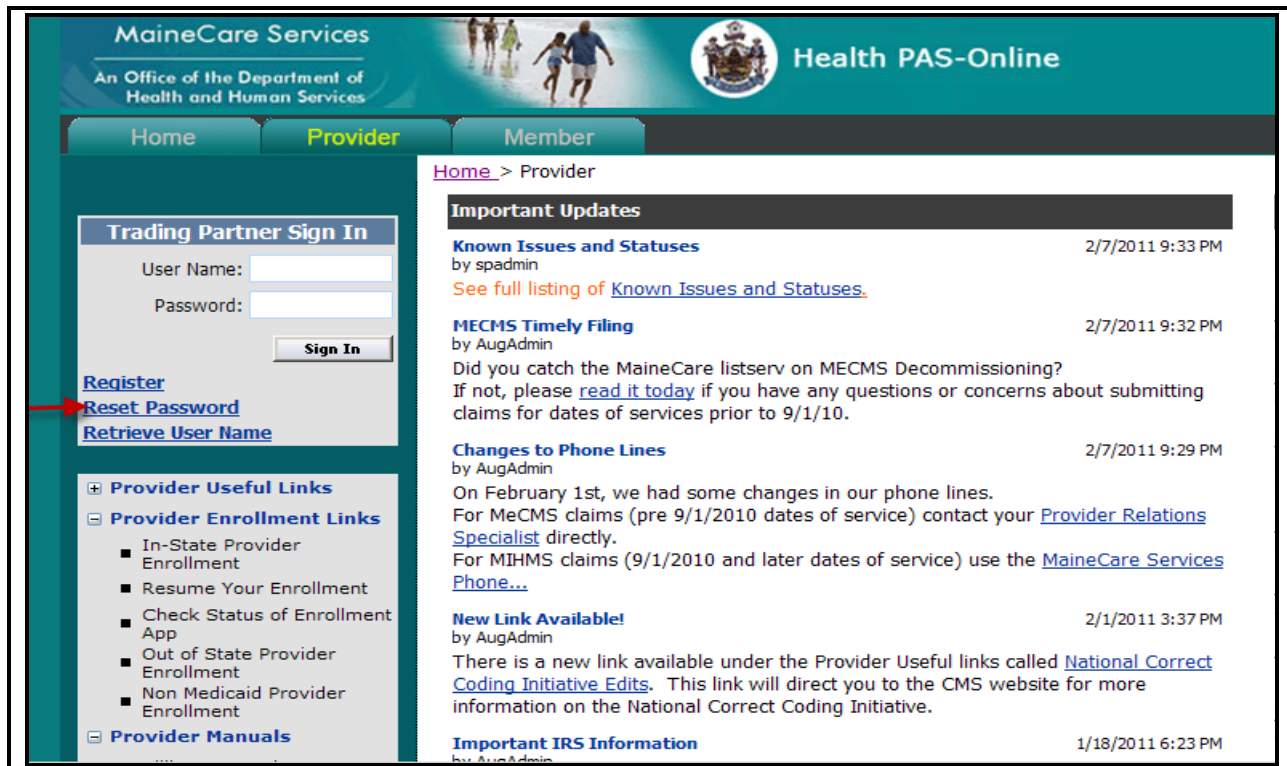


Figure 7-4: Reset Password Link

1. The online portal displays the Trading Partner Reset Password window, as shown in **Figure 7-5** below:

The screenshot shows a web interface titled "Trading Partner Reset Password". Below the title, it says "Forgot Your Password?" and "Please enter your user name to reset your password." There is a single-line text input box. Below the box are two buttons: "Continue" and "Cancel".

Figure 7-5: Trading Partner Reset Password

2. Specify trading partner user name in the box and click the **Continue** button.
3. The online portal displays the email address and security question associated with this user name, as shown in **Figure 7-6** below:

The screenshot shows a web interface titled "Trading Partner Reset Password". Below the title, it says "Please enter your security question answer, and select 'Continue' to reset your password." It then displays "Email Address: p.r.ovidier@domainname.com" and "Security Question: What is the first street I lived on in my hometown?". Below the question is a text input box labeled "Security Answer:". At the bottom are "Continue" and "Cancel" buttons.

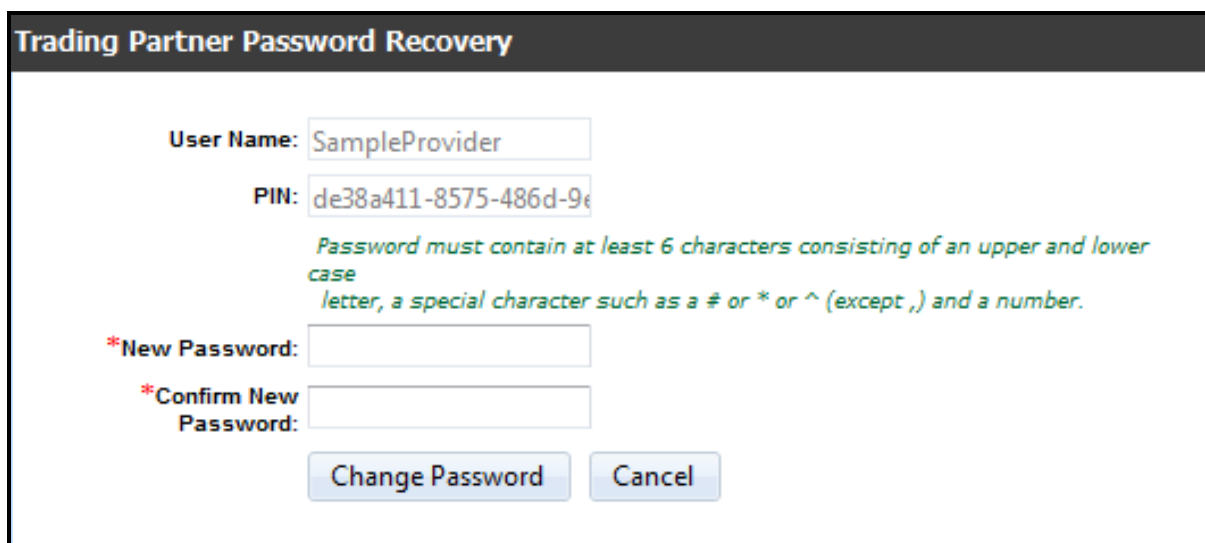
Figure 7-6: Email Address and Security Q&A

4. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is answered successfully the online portal sends an email to the address associated with the user name and displays the confirmation message shown in **Figure 7-7** below:

The screenshot shows a web interface titled "Trading Partner Reset Password". Below the title, it says "SampleProvider" and "Your reset password link has been emailed to the following email address." followed by the email address p.r.ovidier@domainname.com. At the bottom is an "Ok" button.

Figure 7-7: Confirmation of Password

5. The email contains a confirmation link and activation PIN. After receiving the email, click the link (or copy it and paste it into the address bar of a web browser). The online portal displays the Change Password window with the user name and activation PIN already filled in, as shown in **Figure 7-8** below:

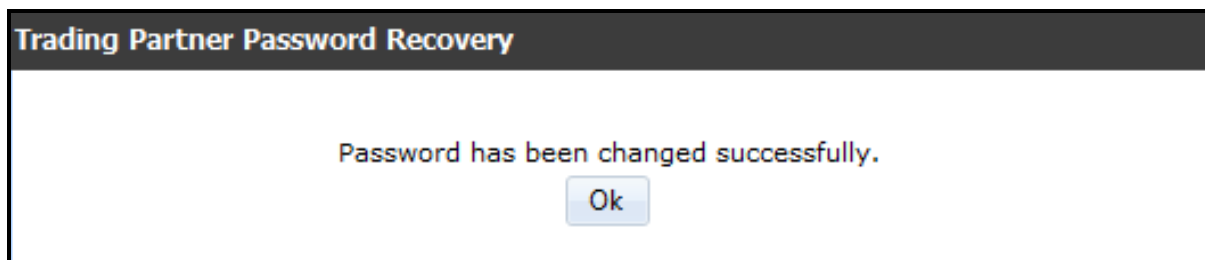


The screenshot shows a web form titled "Trading Partner Password Recovery". It contains the following fields and elements:

- User Name:** A text box containing "SampleProvider".
- PIN:** A text box containing "de38a411-8575-486d-9e".
- Password Guidelines:** A green text message stating: "Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number."
- *New Password:** An empty text box.
- *Confirm New Password:** An empty text box.
- Buttons:** Two buttons at the bottom: "Change Password" and "Cancel".

Figure 7-8: Change Password

6. To complete the Change Password window, follow the steps below:
 - a. In the New Password field, type a password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
 - b. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
 - c. Click the **Change Password** button. The online portal displays a confirmation message, as shown in **Figure 7-9** below:



The screenshot shows a confirmation message in a window titled "Trading Partner Password Recovery". The message reads: "Password has been changed successfully." Below the message is an "Ok" button.

Figure 7-9: Password Reset

7.4 User Name Retrieval

If the trading partner user name is forgotten it is retrieved using the Retrieve User Name link on the online portal Provider page, see **Figure 7-10** below:

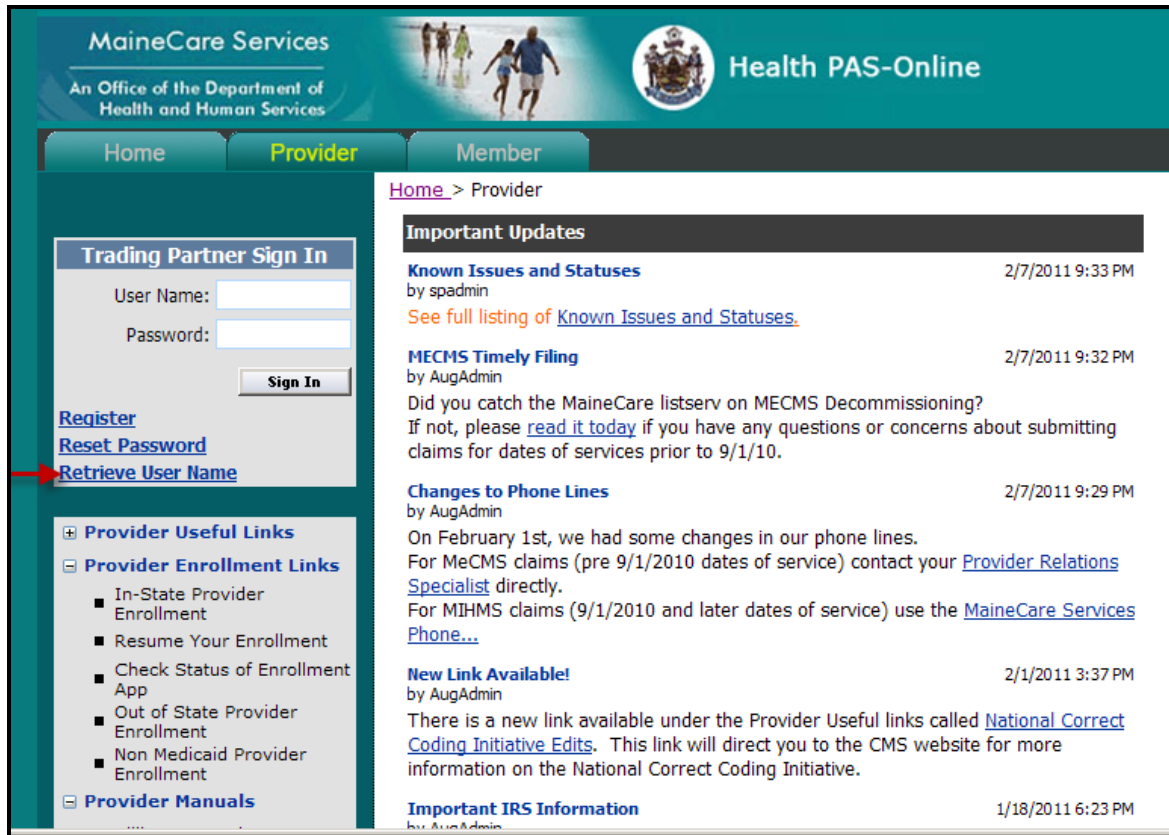


Figure 7-10: Retrieve User Name Link

1. After clicking the link, the online portal displays the Retrieve User Name window, as shown in **Figure 7-11** below:

Figure 7-11: Email Specification for User Name Retrieval

2. Type the email address for the user name to retrieve. Click the **Continue** button.
3. If the email address entered is associated to multiple trading partner accounts, the online portal will display an error, as shown in **Figure 7-12** below. (If the email address is associated to only one trading partner account, the online portal will not show this error.)

**Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses**

Retrieve User Name

Forgot Your Username?
Please enter your E-mail ID to receive your username.

p.r.ovider@domainname.com

Multiple accounts were found. Please enter your trading partner ID to refine search. If you do not know your trading partner ID or if you are public user, please contact us at 866-690-5585

Trading Partner ID:

Figure 7-12: Multiple Accounts Error

4. If this error appears enter the trading partner ID in the field provided. (This number was emailed to the user when the trading partner account was created. It is the same number that is used as the sender ID for X12 submissions.) Click the **Continue** button.

***NOTE:** If the trading partner ID is not known call the number listed in the error message for additional assistance.*

5. After entering the email address (and trading partner ID, if needed) click the **Continue** button, the online portal displays the email address and security question, as shown in **Figure 7-13** below:

Retrieve User Name

To receive your username please enter the requested information and click Continue.

Email Address: p.r.ovider@domainname.com

Security Question: What is the first street I lived on in my hometown?

Security Answer:

Answer is required.

Figure 7-13: Email Address and Security Q&A

6. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is successfully answered the online portal sends an email to the address associated with the user name and displays the confirmation message shown in **Figure 7-14** below:

Retrieve User Name

Your Username was emailed to the following email address.

p.r.ovider@domainname.com

Figure 7-14: Confirmation Message for User Name Retrieval

7. Click **Ok**. The email contains the user name and trading partner ID.

8. User Maintenance

8.1 Manage Users

8.1.1 Adding Users

Use the Manage Users link to grant new users access to the clearinghouse's trading partner account.

1. Sign in to the secure Trading Partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **Account Maintenance** link in the far left column.
3. Choose the **Manage Users** link as shown in **Figure 8-1** below:



Figure 8-1: Account Maintenance

4. Click the **Add User** button, as shown in **Figure 8-2** below:

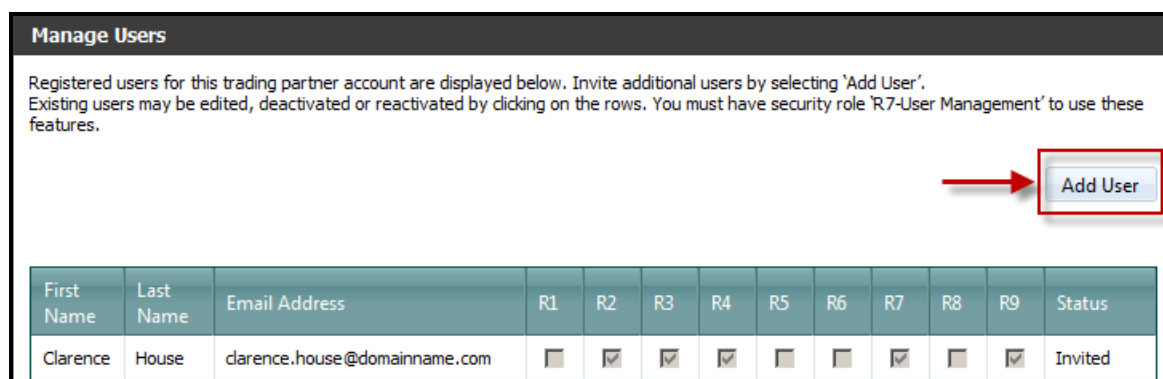
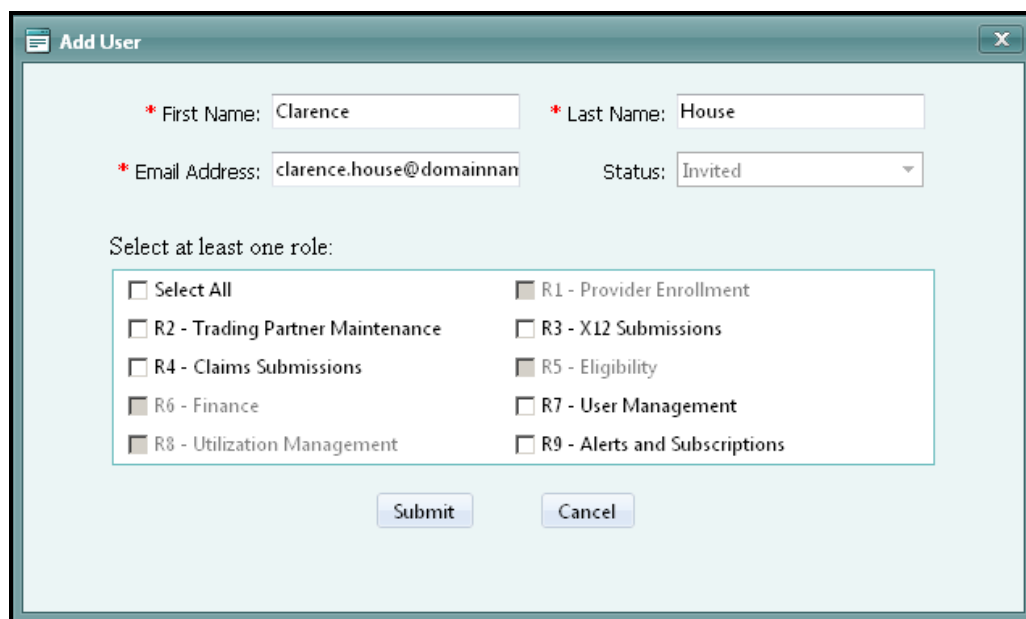


Figure 8-2: Add User

5. The Manage Users window updates to display the fields needed to invite an additional user and specify their permissions, as shown in **Figure 8-3** below:

Maine Integrated Health Management Solution Trading Partner Guide for Clearinghouses



The 'Add User' dialog box contains the following fields and options:

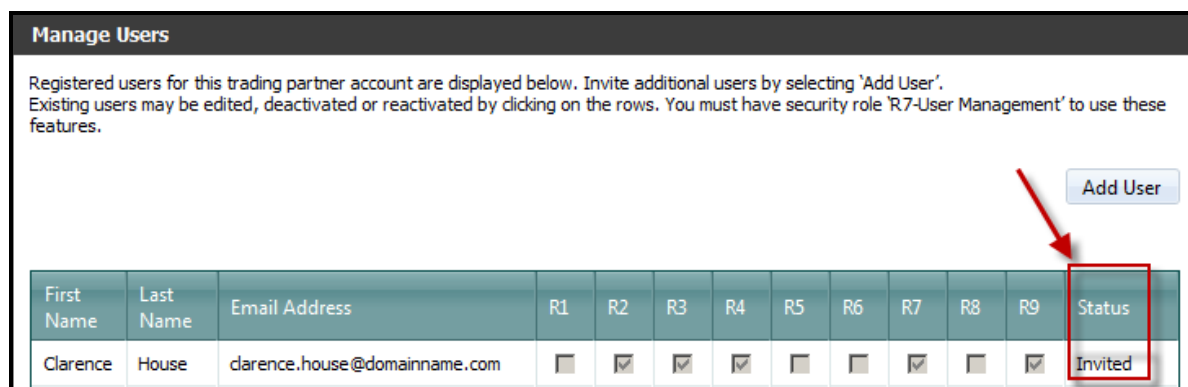
- * First Name: Clarence
- * Last Name: House
- * Email Address: clarence.house@domainname.com
- Status: Invited (dropdown menu)
- Select at least one role:

 - ☐ Select All
 - ☐ R2 - Trading Partner Maintenance
 - ☐ R4 - Claims Submissions
 - ☐ R6 - Finance
 - ☐ R8 - Utilization Management
 - ☐ R1 - Provider Enrollment
 - ☐ R3 - X12 Submissions
 - ☐ R5 - Eligibility
 - ☐ R7 - User Management
 - ☐ R9 - Alerts and Subscriptions

- Submit button
- Cancel button

Figure 8-3: Permission Fields

6. To complete the fields, follow these steps:
 - a. Specify the invited user's first and last names in the First Name and Last Name fields, respectively. These are required fields.
 - b. In the Email Address field, specify the invited user's email address. This is a required field.
 - c. Select at least one permission for the invited user. (Selections can be modified later to give users any number or combination of permissions as business needs change. Please see Section 8.1.2: **Trading Partner Permission Codes** for a more detailed description of the powers allowed by each permission.)
7. Click the **Submit** button. The online portal sends an email invitation to the specified user. The Manage Users window displays the invited user's name, email address, and permissions, as shown in **Figure 8-4** below:



The 'Manage Users' window displays a table of registered users. A red arrow points to the 'Add User' button, and a red box highlights the 'Invited' status of the user 'Clarence House'.

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
Clarence	House	clarence.house@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invited

Figure 8-4: Invited Users

In order for the invited user to activate their account, they must follow the steps described in Section 8.1.3: **(Invited Users Only) Activating a Trading Partner Representative Account**.

8. To invite additional users, repeat the process described in steps 4 through 7 above.

8.1.2 Trading Partner Permission Codes

Though each user on trading partner account must have at least one permission, any combination of the permissions are available to assign. Please find in this section a table listing all permission codes and another detailing the powers that each code grants to users, see **Table 1** and **Table 2** below:

Table 1: Trading Partner Permission Codes & Descriptions

Requires TPA	Code	Trading Partner User Access Area	User Powers*
Y	R1	Provider Enrollment Maintenance	Provider account maintenance
Y	R2	Trading Partner Maintenance	Account maintenance including provider associations and demographics updates (Clearinghouses do not require provider associations)
Y	R3	X12 EDI Transactions	File Exchange (X12), and report access
Y	R4	Claim Submission, Claim Status	Access Remittance Advice (PDF) and reports, claim submission, claim status, patient roster and primary care roster
Y	R5	Eligibility Verification	Eligibility verification, patient roster and primary care roster
Y	R6	Payment Status	Provider payment status
Y	R7	User Management	Manage account users
Y	R8	Referral Submission & Status, Authorization Submission & Status	Authorization submission, authorization status, patient roster, primary care roster, referral submission and referral status
Y	R9	Alerts and Subscriptions	EDI Gateway alerts and subscriptions– these advise trading partners when they have a X.12 (825, 271, RA etc.) response awaiting collection.

* All codes grant personal password reset powers.

**Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses**

Not all powers are available to every type of trading partner account. For the list of the powers available to users for clearinghouse trading partner accounts, refer to **Table 2** below.

Table 2: Clearinghouse User Powers Grid

Requires TPA	Menu Item	Health PAS Online User Access*	Clearinghouse
	Account Maintenance		Access Rights
Y	Manage Users	R7	X
Y	Provider Associations	R2	
Y	Rest Password	All	X
Y	Update Demographics	R2	X
Y	File Exchange (X12)	R3	X
Y	Remittance Advice (PDF)	R4	X
Y	Other Reports	All	X
Y	Alerts and Subscriptions	R9	X
	Form Entry		Access Rights
Y	Authorization Submission	R8	
Y	Authorization Status	R8	
Y	Claim Submission	R4	
Y	Claim Status	R4	
Y	Eligibility Information	R5	
Y	Patient Roster	R4, R5, R8	
Y	Primary Care Roster	R4, R5, R8	
Y	Provider Payment Status	R6	
Y	Referral Submission	R8	
Y	Referral Status	R8	
	Provider Enrollment		Access Rights
Y	Provider Maintenance	R1	

8.1.3 (Invited Users Only) Activating a Trading Partner Representative Account

When a user is invited to create a trading partner representative account an email is sent that contains an activation link. The invited user should click this link to begin their enrollment process. An example of the Trading Partner Representative Registration window appears in **Figure 8-5** below:

Trading Partner Provider Representative

*Indicates Required Information

*User Name:

*Password: Password must contain at least 6 characters consisting of an upper and lower case letter, a special character such as a # or * or ^ (except ,) and a number.

*Re-enter Password:

*Email Address:

*Re-enter Email Address:

Please enter a confidential question and answer for password reset and user name recovery purposes.

*Security Question:

*Security Answer:

Continue Cancel

Figure 8-5: Trading Partner Registration

To complete this window, follow these steps:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk “*”) and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. The Email Address field will be auto-populated. Verify this information is accurate.
5. The Re-Enter Email Address field will be auto-populated. Verify this information is accurate..
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, “What street did I live on as a child?” or “What was the make of my first car?”) If a password is forgotten this question and answer pair is used to verify the user’s identity.

NOTE: All fields are required.

7. Click the **Continue** button. The online portal creates the user name and password as specified. (To log in to the secure trading partner feature, the invited user will use this information in the User Name and Password fields on the online portal Provider page. Refer to **Section 5: Trading Partner Login** for more information about logging in to the online portal.

8.1.4 Modifying User Permissions

To modify the permissions granted to a provider representative a user must have R7 (User Management) permission for the trading partner account. Follow the steps below:

1. Sign in to the secure trading partner area on the online portal Provider page.
2. On the Welcome to Trading Partner window, expand the **User Maintenance** link in the far left column.

Maine Integrated Health Management Solution Trading Partner Guide for Clearinghouses

3. Choose the **Manage Users** link. The online portal displays the initial Manage Users window, as shown in **Figure 8-6** below:

Registered users for this trading partner account are displayed below. Invite additional users by selecting 'Add User'. Existing users may be edited, deactivated or reactivated by clicking on the rows. You must have security role 'R7-User Management' to use these features.

[Add User](#)

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
Clarence	House	clarence.house@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invited
John	Smith	John.Smith@domain.name.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activated
Account	Manager	Account.Manager@domain.name.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

Navigation: [K](#) [<](#) [1](#) [>](#) [X](#) Page: 1 of 1 [Go](#) Page size: 3 [Change](#) Item 1 to 3 of 3

Figure 8-6: Manage Users

4. Click **anywhere on the row** of the user whose permissions need to be modified. The Manage Users window expands to show identification, status, and permissions fields for the user selected.
5. Modify the information as necessary, see **Figure 8-7** below:

Edit User

* First Name: * Last Name:

* Email Address: Status:

Select at least one role:

<input checked="" type="checkbox"/> Select All	<input type="checkbox"/> R1 - Provider Enrollment
<input checked="" type="checkbox"/> R2 - Trading Partner Maintenance	<input checked="" type="checkbox"/> R3 - X12 Submissions
<input checked="" type="checkbox"/> R4 - Claims Submissions	<input type="checkbox"/> R5 - Eligibility
<input type="checkbox"/> R6 - Finance	<input checked="" type="checkbox"/> R7 - User Management
<input type="checkbox"/> R8 - Utilization Management	<input checked="" type="checkbox"/> R9 - Alerts and Subscriptions

[Update](#) [Cancel](#)

Figure 8-7: Manage Users with Additional Permissions

**Maine Integrated Health Management Solution
Trading Partner Guide for Clearinghouses**

6. Click the **Update** button. The online portal saves the changes and refreshes the window to show the user list with the modified permissions, as shown in **Figure 8-8** below:

Manage Users

Registered users for this trading partner account are displayed below. Invite additional users by selecting 'Add User'. Existing users may be edited, deactivated or reactivated by clicking on the rows. You must have security role 'R7-User Management' to use these features.

Add User

First Name	Last Name	Email Address	R1	R2	R3	R4	R5	R6	R7	R8	R9	Status
Clarence	House	clarence.house@domainname.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invited
John	Smith	John.Smith@domain.name.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activated
Account	Manager	Account.Manager@domain.name.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activated

K

<

1

>

X

Page: 1 of 1

Go

Page size: 3

Change

Item 1 to 3 of 3

Provider Representative details Updated Successfully

Figure 8-8: User List with Modified Permissions